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ABSTRACT

The growing resistance of professionals to relocate in response to a job offer or transfer is being widely discussed. Revisions in corporate relocation policies may be needed to overcome this resistance. Telephone interviews were conducted with 33 male and 35 female professionals in dual-career households to explore reactions to relocation. The results showed that 68% of respondents had moved in the past 10 years while 15% refused an offer to relocate. Only three respondents said they would never relocate, 60% mentioned salary increase and professional advancement as incentives to move, 51% mentioned a job offer in a desirable location, and 24% cited assurance of suitable employment for their spouse as an incentive to relocate. There were no race differences in having moved in the past or willingness to move. Blacks identified the same incentives to relocate as whites but they had additional considerations, including determining whether the company's interest was more than a token hiring of minorities and finding communities which were receptive to minorities. These findings suggest that companies can assist relocating employees by offering flexible relocation assistance benefits showing that the company cares about their well-being, and staying informed about the changing needs of relocating employees. (Author/NB)

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ABSTRACT

A study was conducted among 33 male and 35 female professionals in dual-career households to explore their reactions to relocation. One-half of the sample was black, the other half was white. The data were gathered through semi-structured telephone interviews.

The results show that 68% of the respondents had moved in the last ten years; an additional 15% had refused an offer to relocate. In response to the question what they would consider to be an incentive to move, only three out of the total of 68 respondents said they would never relocate. Everyone seemed to have his/her conditions that needed to be met before a move would be considered. Sixty percent mentioned salary increase and professional advancement as an incentive to move: for 51%, the incentive would be a job offer in a "desirable" location. Assurance of suitable employment for their spouse was mentioned as an incentive by 24% of the respondents.

There were no race differences in having moved in the past or willingness to move in the future. Also, black professionals saw as incentives the same factors emphasized by white professionals but they had additional considerations that were equally, if not more, important. They were concerned with determining whether the company's interest in them went beyond a token hiring of minorities. Thus they were reluctant to subject their families to relocation unless they believed there was a future for them in the company. Black professionals also expressed concern over finding communities which were receptive to minorities.

On the basis of these results a number of policy suggestions were formulated as concrete ways companies can assist employees to relocate. These are: 1)offering flexible relocation assistance benefits to meet a variety of needs different employees may have; 2) doing some short-term "handholding" with employees slated for relocation to make them feel that the company cares about their well-being; and 3) staying informed about the changing needs of employees as they face relocation.

> My husband and I wouldn't consider relocation because our respective extended families have become very important, more so with the arrival of the baby but even before the baby was born. We moved here basically to be with our families. My father is getting old and may need our care. We'd like to stay here and be with family.
>
> Before you subject your wife and children to the trauma of moving you need to know the institution's position regarding the advancement of blacks. Is it a firm corporate policy or is it simply window dressing? Is it the revolving door type of treatment--several new ones in and out every few years? Is there a high density concentration of minorities at only certain levels and no higher? Can a minority line manager become a general manager, a vice president, a president?
>
> A few years ago we moved for my husband's job. It created such a trauma! When I followed my husband West I didn't want to go, but I didn't dare say so. I didn't want to interfere with his career. The most I could say was I would have to come back East to visit. What bothered me most was I realized I'd been moved bodily to a place I did not want to go. I had no attachments there. I went only because I was his wife and a woman. I decided I would never be uprooted again and not say my mind.

These quotes, one representing a refusal to relocate and the other two expressing serious concerns, are not uncommon sentiments in the 1980's. The growing resistance to relocate in response to a job offer or transfer is being widely discussed in the media (e.g. Guillet, 1980; Haight, 1983; Magnus & Dodd, 1981; Strauss, 1981; Tavernier, 1980; Weiner, 1981). Today, the idea that geographical mobility is a necessary part of c[illegible]te mobility is even less well received by men and women of the corporation than it was even five years ago.

Many factors contribute to this reluctance to pack up one's family and move in response to a job offer in another location. Rapidly

changing employment conditions are perhaps the primary concern. The ever increasing numbers of mergers, plant consolidations and plant closings and paring down the numbers of managers to achieve a leaner managerial force create a climate of uncertainty over the long-term stability of one's position in the corporation. Naturally, such questions about the security of employment contribute to a reluctance to move. Also, when so many people have concerns about their future employment security, minorities and women feel the added burden of being newcomers to the corporate world. As the second quotation suggests, a minority or a female employee does not always know whether the company's offer is so much affirmative action window dressing or a real opportunity to carve a future in the company (see Fields & Erkut, 1983).

Secondly, uncertainty surrounding the real estate market also contributes to a hesitation to relocate. Wide fluctuations in mortgage rates since 1980, coupled with the variety of creative financing schemes, as well as the related difficulty in establishing current market value in housing, make the timing of buying and selling a house a major problem. Chances are that the best time to buy and sell a house will not coincide with the timing of the job transfer.

A third reason for the unwillingness to move is the growing recognition that there is more to life than work. Attaining a certain quality of life has come to compete with corporate advancement as a legitimate goal in life. Easy access to favorite leisure activities,

the friendliness of the neighborhood, quality of schools in the community, the serenity of a rural environment, or the stimulation of an exciting metropolitan existence may mean more to the employee than a marginal salary increase gained through relocation. This sentiment does not necessarily translate into a refusal to relocate, but it does mean that many employees are highly selective about where they will move and are resistant to moving again once they feel they have found the ideal spot.

The increasing number of two-career households also contributes to the reluctance to move. An offer of relocation to one of the partners/spouses often means an unwelcome disruption of the other's employment. When it is the female employee who is tapped for relocation, traditional upbringing does not even begin to provide a blueprint for how her partner/spouse should react to the impending move. In the case of male employees, much has been written to document that their partners are no longer the docile followers responding without hesitation to the beck and call of the corporation (e.g., Friedman, 1981; Maynard & Zawacki, 1979; Pave, 1985; Strauss, 1981). The variety of spouse job-finding assistance programs available (see Catalyst, 1983; Dienstag, 1982; Erkut & Fields, 1984; Evans, 1980; Mainker, 1981; Trippel, 1985) is a testament to the corporate world's recognition of the fact that when the employee is offered a job in a new location the spouse/partner will not automatically follow, and often expects assistance in mapping out her/his career in the new location.

Finally, a related but distinct source of resistance to moving comes from a growing realization that all members of an immediate or extended family will be affected by the move. As the first quotation suggests, close ties to extended family may mitigate against a decision to relocate. Many employees are reluctant to move away from elderly parents who may depend on them for care, and because of increased longevity, more and more adults find themselves in such a situation. Also, perhaps because we are becoming more democratic in family decision-making, many employees are becoming increasingly sensitive to how a move will affect their children (Erkut, 1986). Often, if they are pleased with their children's schools and peer relations, parents are reluctant to uproot the family, especially if the children have special needs or have been through a wrenching relocation experience previously. Sometimes parents choose to wait for a more suitable juncture in their children's education--going away to boarding school or college are obvious examples. Some consider the end of elementary school or junior high a good time to relocate. Other families have reported that relocation at these times was very difficult. The growing democratization of decision-making in the family may also contribute to a reluctance to move because of consideration for the needs of a non-employed spouse/partner. Although this is not strictly a "dual-career" issue since the partner is not employed in paid work, it does reflect the growing resistance to being uprooted every so many years at the company's pleasure.

What is a corporation to do in response to the growing reluctance on the part of employees to relocate? Certainly the employer's response ought not to be to shy away from relocating the employees, but to meet the challenge creatively. The resistance to moving can be overcome in different ways. The experiences of individuals and families who have relocated in the last decade can provide useful ideas for revising corporate relocation policies. Moreover, in the last decade there has been a new phenomenon in corporate relocation, that of moving growing numbers of minority and women employees. This situation is likely to continue and even to increase in the coming decade. Yet not much is known about the relocation concerns of minority and female employees. It is with these issues in mind that we launched the study of relocation of dual-career professionals.

METHODS

We surveyed 33 male and 35 female professionals whose spouses were also professionals about their reaction to relocation. The sample was selected by the network/snowball technique. The technique involved initially contacting a small group of dual career couples known to the authors who fit the criteria of both spouses being college graduates and falling into one of the following three categories: childless couples, couples with preschool children and couples with school-aged children. These couples were then asked to provide names of other dual career couples who fit the sampling criteria. Using this method we interviewed 68 individuals. One third of the sample had no children, one third had preschool aged children, and one third had school-aged children. In each of these three categories half of the respondents

were black and half of them were white. The respondents included lawyers, health care professionals, engineers, managers and academicians. The data were gathered by telephone interviews. A semi-structured interview format was used. The interview schedule contained questions on the respondents' relocation history in the last ten years. We asked about what they considered to be an incentive to move, whether they had in fact moved, and whose career (husband's or wife's) initiated the move. Finally, we explored what corporate relocation services they received and which services they considered to be the most helpful.

RESULTS

Sixty-eight percent of the respondents reported moving in the last ten years. Among those who moved the vast majority moved as a couple. Fifty-seven percent said the move was initiated by a job offer for the husband, 19% by a job offer for the wife and nine percent reported that the move was initiated by offers for both spouses. Fifteen percent of those who relocated reported moving to look for work before they were married. Fifteen percent of the total sample said they had turned down offers to move in the last ten years. Reasons for refusal varied: e.g. the offer was in an unattractive area, the move would have upset spouse's career, or the move would have created instability in the family. We found no race difference in having moved or refusing to move in this sample.

Very few respondents (three out of 68) said it was extremely unlikely for them to ever move. Even those who had refused to move in the last ten years said they would consider relocating if the offer was right. Everyone seemed to have his or her conditions that needed to be met before a move would be considered. These conditions fell under three broad categories: 1) salary increase and/or professional advancement (mentioned by 60% of the respondents) 2) moving to a "desirable" location in terms of the community's receptivity to new-comers (especially important for minority employees), climate, and leisure activities (mentioned by 51%) and 3) assurance of suitable employment for the spouse, mentioned by 24% of the respondents. Household relocation benefits were not viewed as an incentive to move; they were expected. Everyone we surveyed assumed that the corporation would offer a relocation package to assure that the actual moving of the household would be accomplished as smoothly as possible.

Nearly everybody who said an increase in salary was an important incentive for relocation was quick to add that this incentive alone was not enough. They also expected the job to be interesting and to carry more responsibility, with a clear career-advancement path.

Black professionals were as concerned about salary and advancement as whites but had additional considerations that were equally, if not more, important. Their first concern was to obtain an understanding of the depth of the company's commitment to the advancement of minority professionals. They were suspicious of a "revolving door" policy that would hire, but not promote or advance them. Their second concern was the receptiveness toward minorities of the community into which they expected to move.

Suitable employment for the spouse in the new area was a condition for moving for only 24% of the respondents but this group viewed spouse employment as a nonnegotiable demand. The following comments were typical:

> Before I accept a job, a second job (for my wife) would have to be found.
>
> My wife getting a job is a condition for me to accept a job offer involving a move.
>
> We would move again only if my husband and I found two really interesting, stimulating jobs in the same place.

All respondents who reported moving in response to a job offer said they received some compensation for moving their household goods. Fifty-five percent mentioned coverage for additional moving expenses such as temporary housing and travel expenses. The vast majority of those who got additional moving expenses also reported receiving housing assistance. Most of this was in the form of help in looking for housing in the new location and/or assistance with securing a mortgage. Finally, 22% said their spouse received help in looking for work in the new location. In general, it appears that employee relocation benefits which provide coverage for expensive services such as help with a mortgage also provide the relatively less expensive coverage such as the cost of moving household goods.

Of the variety of relocation assistance benefits our respondents reported receiving, 39% said they found the coverage for additional needs related to a move to be very helpful. Included among these were access to a rental car and coverage of expenses incurred while looking for housing in the new location. Forty-one percent said they found the housing assistance to be most helpful. Among the helpful housing assistance services mentioned were coverage of closing costs, company loan for a down payment, referral to a competent realtor, assistance with mortgage (MIDS), and demographic information about the new community.

A definite pattern emerged in the responses to the question on what type of relocation assistance was most helpful. Most respondents singled out

what they perceived to be the most expensive benefit they received. In addition, services which closely fit personal needs or "perks" which were out of the ordinary were also appreciated. Examples of such services are coverage for packing and unpacking expenses and tax exempt cash assistance for moving expenses. The overriding pattern in what was perceived as helpful was any assistance which made the employee feel someone in the company was looking out for their benefit. Expensive benefits, personalized assistance and "perks" were all viewed as evidence that the company wanted to make them feel good about the move.

IMPLICATIONS FOR CORPORATIONS

There are concrete ways in which companies can induce employees to relocate, as well as to help insure that the move will be a success. Some employers have already adopted policies that, according to our respondents, made the extra difference in the decision to move. Below are listed ways our respondents told us companies can induce them to relocate, as well as insuring that the move will be a success.

Be Flexible

The solution to relocation problems tends to be unique to each employee and his or her family situation. Therefore, corporations need to recognize the importance of flexibility in their formulation and implementation of relocation policies. Cafeteria-style benefits packages in which employees have a choice of particular benefits the company offers within a uniform cost ceiling can provide the needed flexibility.

Do Some "Handholding"

Many employees (and their families) resent feeling like pawns in the corporate mobility game. Corporations should consider involving potential transferees in many aspects of the transfer decision as an empowering strategy. One way to accomplish this is to institute pre - and post-move discussions among employees, both to learn about their reactions to the move and to convey to them that the company is concerned with their personal as well as their family's adjustment. These discussions have the added benefit of providing useful feedback to companies as they create and revise their relocation policies for transfers, new hires, and group moves.

Be Informed

Companies cannot afford to be unaware of the concerns of employees who face relocation. Corporations should hire knowledgeable relocation specialists. Employees who have experienced successful moves report that a key factor in the smooth functioning of their relocation was a knowledgeable and sensitive relocation specialist. These people are often considered the "best friends" of employees who, facing relocation, are at a vulnerable point in their lives. Minority professionals are especially likely to benefit from a well-informed relocation specialist who can put them in touch with a network of other minority professionals in the new area and can provide honest and detailed information about the receptivity of the new communities

toward minorities. An effective relocation specialist not only does a needs assessment of employees and their family concerns, but also goes out and aggressively seeks answers to those concerns. Examples of helpful information reported by our respondents included a listing of suitable temporary housing, names of realtors pre-screened for effectiveness, varieties of household financing plans, data on the demographic characteristics of the potential new communities, and availability of resources for special needs, all the way from facilities for the physically challenged to a voice coach for the budding singer in the family.

CONCLUSION

The results show that the growing resistance to relocate is not just so much media hype but is based on real concerns. Yet, the resistance to relocate rarely translates into an absolute refusal to move. Different people have different needs, concerns, or conditions which must be met to induce them to consider relocating. The concerns of minorities and women, the newcomers to the corporate world, are in many ways similar to those of the traditional employee. However, because they are newcomers, they are also concerned with determining whether the company's interest in them goes beyond filling affirmative action slots. Thus, they are reluctant to undertake a move unless they believe there is a future for them in the company. Minority employees have the additional need to find a selection of housing alternatives in communities which will be

receptive to them if they should decide to move. All in all, the concerns of the minorities, women, and the more traditional white male employees are not insurmountable barriers. Corporations can overcome the growing resistance to relocate by offering flexible (perhaps cafeteria-style) relocation assistance packages to meet the variety of needs different employees have, by being willing to do some short-term "handholding" with employees slated for relocation to make them feel that the company cares about their well-being and by staying informed about the changing needs of employees and their families as they face relocation.

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